

Sustainable Pharmaceutical Packaging Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Material (Paper, Glass, Metal, Plastic), By Process (Reusable Packaging, Biodegradable Packaging, Recycled Packaging), By Product Type (Bottles, Caps & Closures, Pouches & Sachets, Others), By End User (Pharma Manufacturing, Contract Packaging, Retail Pharmacy, Others), By Region and Competition, 2019-2029F

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Abstracts

Global Sustainable Pharmaceutical Packaging Market was valued at USD 72.84 Billion in 2023 and is anticipated to project impressive growth in the forecast period with a CAGR of 8.22% through 2029. The Sustainable Pharmaceutical Packaging Market comprises companies and solutions dedicated to developing eco-friendly packaging materials and methods for pharmaceutical products. This market segment prioritizes the reduction of environmental impact through innovative packaging designs that use renewable materials, ensure recyclability, and reduce waste. As the pharmaceutical industry continues to grow, sustainable packaging is becoming increasingly vital in addressing environmental concerns and adhering to stringent regulations regarding sustainability.

Key Market Drivers

Increasing Investment for the Development of Technology & Medicines

The growth of the pharmaceutical market has benefitted from the efforts of several

nations. The industry is in charge of developing, producing, and selling medicines all over the world. More than one trillion dollars revenue are generated by the pharmaceutical sector worldwide. Many pharmaceuticals manufacturing companies like Pfizer, GlaxoSmithKline (GSK), Novartis, are determinedly spending substantial sums of money on the creation of new and improved medications.

The escalating investment in the development of technology and medicines is fueling a cycle of continuous growth and innovation within the healthcare industry. This increasing financial support stems from various sources, including government initiatives, private investments, and research grants, all aimed at advancing medical science and improving patient outcomes. As investment pours into research and development endeavors, there is a corresponding acceleration in the pace of technological advancements and pharmaceutical discoveries. These investments facilitate the exploration of cutting-edge technologies such as artificial intelligence, genomics, and precision medicine, revolutionizing diagnostics, treatment modalities, and patient care pathways. The pharmaceutical sector benefits from substantial investments directed towards drug discovery, clinical trials, and regulatory approvals, leading to the introduction of novel therapies and breakthrough medicines. Ultimately, this synergistic interplay between investment and innovation propels the healthcare industry forward, driving advancements that have the potential to transform healthcare delivery, enhance quality of life, and address unmet medical needs on a global scale.

Growing Demand from Pharmaceutical Industry

In the current scenario, the health problems are increases and people are more aware regarding their health the demand for local and imported pharmaceutical products increased as economies grew, and healthcare provision and insurance mechanisms expanded. The pharmaceutical sector is growing quickly, mostly in developed and developing nations. The population is growing, technological advancements are increasing, healthcare awareness is increasing, advanced manufacturing techniques are being adopted, public healthcare system spending is increasing, and new government regulations are being put in place to stop the spread of infectious diseases. It is anticipated that the pharmaceutical business will expand as a result of increased demand for biological goods and cutting-edge medicines including cell and gene therapies.

With increasing number of drugs approval by the regulatory bodies further increase the demand of packaging material by manufacturers industry as the production of drugs

increases. For instance, in 2022, US Food and Drug Administration's (FDA) Center for Drug Evaluation and Research (CDER) approved 37 novel drugs. Rising acquisitions and mergers in the pharmaceuticals industry as well as introduction of new technology with efficient and cost-effective production methods along with this growing valuable investment is also contributing to the growth of market. In Jan 2023, Sun Pharma acquired US-based Concert Pharma which helps to add a late-stage, potential best-in-class treatment for Alopecia Areata in Deuruxolitinib.

Many pharmaceutical industries have expanded outsourcing packaging-related tasks to save costs and save time. To ensure effective packaging, firms are outsourcing packaging activities to specialized and highly competent contractors rather than investing in packaging items. It is anticipated that this would rise the demand of contract manufacturing. Pharmaceutical companies also use child-resistant and senior-friendly (CRSF) recyclable packaging solution to reduce the risk of children and senior ingesting hazardous materials. In developed nations it is compulsory to use child resistant packaging for medicines such as paracetamol, aspirin, iron tablets. Therefore, high demand for sustainable pharmaceutical packaging led to the growth of Global Sustainable Pharmaceutical Packaging Market in the forecast years.

Rising Demand for Sustainable & Durable Packaging

The development and application of packaging in pharmaceutical sector that increases sustainability is referred to as sustainable pharmaceutical packaging. Reusing the package and lessening the environmental impact are made possible by strong, long-lasting packaging goods with returnable features. Sustainability packaging reduces the amount of packaging trash that ends up in landfills. End users are adopting more environmentally friendly packaging strategies to improve the reputation of their brands, as well as increased regulatory pressure on the usage of plastic packaging. For instance, according to the 2022 Global Buying Green Report, by Trivium Packaging a high-quality and infinitely recyclable metal packaging provider based in the Netherlands, conduct a survey of end users in Europe, North America, and South America found that 86% of younger generations consumers were willing to pay more for sustainable packaging.

However, as many governments all around the world are aware of threats associated with environmental issues, several policies have been implemented to encourage eco-friendly packaging manufacturers. Favorable government policies allowing subsidies to packaging manufacturers, particularly in developed nations, create lucrative opportunities for market players to increase their production volume. Under

the pressure of these government initiatives, major players have started investing in expanding numerous recycling programs for waste packaging materials released from various commercial units and industries. Many market players have focused their efforts on generating innovative technologies for shifting to environmentally friendly packaging solutions for food packaging to reduce environmental impact. For instance, in 2022, Amcor's AmSky recyclable blister packaging system offers pharmaceutical and nutraceutical companies a packaging solution. This innovation helps to reduce packaging waste and environmental pollution. Thus, increasing technological advancement by many players dominates the growth of Sustainable Pharmaceutical Packaging market worldwide.

Along with this, merger, and acquisition activity in the packaging market enhances companies' presence in the global scale as these acquisitions help companies to better serve their customers and meet the growing demand for sustainable pharmaceutical packaging in the forecasted period. In 2021, SCHOTT and Serum Institute of India announced joint venture for pharmaceutical packaging in various products such as vials, syringes, ampoules and cartridges that are used to package life-saving medications. The high cost of sustainability packaging due to the high cost of recycling processing of packaging materials and fluctuation in the price of raw materials limiting the market growth during the forecast period. Along with this, availability of low-cost alternative solutions such as paper bubble wrap, paper tape, and corn starch packaging, is restraining the growth of the Global Sustainable Pharmaceutical Packaging Market.

Key Market Challenges

Research & Development Expenditure

Research and development (R&D) expenditure can have a dual impact on the demand for sustainable pharmaceutical packaging globally. On one hand, pharmaceutical companies invest significant resources in R&D efforts to develop innovative medications and therapies, often prioritizing advancements in drug efficacy, safety, and regulatory compliance. As a result, R&D budgets may be heavily allocated towards drug development rather than sustainable packaging solutions. This can lead to limited investment in researching and implementing sustainable packaging materials and technologies, potentially decreasing the availability and adoption of eco-friendly packaging options in the pharmaceutical industry.

On the other hand, some pharmaceutical companies recognize the importance of

sustainability and allocate a portion of their R&D budget towards developing sustainable packaging alternatives. However, the overall impact of R&D expenditure on the demand for sustainable pharmaceutical packaging globally ultimately depends on the priorities and strategies of individual pharmaceutical companies and the regulatory landscape within which they operate.

Material Innovation Constraints

Material innovation constraints are posing challenges and decreasing the demand for sustainable pharmaceutical packaging globally. While there is growing interest and awareness in adopting eco-friendly packaging solutions within the pharmaceutical industry, the availability of suitable materials for sustainable packaging remains limited. Constraints in material innovation, such as the development of biodegradable polymers with the necessary properties for pharmaceutical packaging, can hinder progress in adopting sustainable packaging alternatives. Ensuring that sustainable materials meet stringent regulatory requirements for pharmaceutical packaging, including compatibility with drug formulations, stability, and shelf-life considerations, further complicates the adoption process.

The high cost of developing and scaling up production of novel sustainable materials may deter pharmaceutical companies from investing in sustainable packaging solutions. As a result, material innovation constraints continue to impede the widespread adoption of sustainable pharmaceutical packaging, highlighting the need for collaborative efforts among stakeholders to overcome these challenges and drive innovation in eco-friendly packaging materials and technologies.

Key Market Trends

Innovations in Biodegradable Materials

Innovations in biodegradable materials are fueling an increase in the demand for sustainable pharmaceutical packaging globally. Traditional pharmaceutical packaging, often composed of plastic or non-biodegradable materials, contributes to environmental pollution and waste accumulation. However, the development of biodegradable alternatives offers a more eco-friendly solution for packaging pharmaceutical products. Biodegradable materials, derived from renewable sources such as plant-based polymers or bioplastics, have gained traction due to their ability to break down naturally into non-toxic components, reducing environmental impact and landfill waste.

Advancements in biodegradable packaging technologies have led to the creation of innovative packaging solutions that maintain product integrity, safety, and shelf-life while minimizing environmental harm. As awareness of environmental sustainability grows among consumers, pharmaceutical companies are increasingly prioritizing the adoption of sustainable packaging practices to meet consumer demands and reduce their carbon footprint. Consequently, the demand for sustainable pharmaceutical packaging, driven by innovations in biodegradable materials, is on the rise globally, reshaping the pharmaceutical industry's approach to packaging and sustainability.

Expansion of Pharmaceutical Markets

The expansion of pharmaceutical markets globally is driving an increased demand for sustainable pharmaceutical packaging. As pharmaceutical companies expand their reach into new markets and regions, the volume of pharmaceutical products being produced and distributed is growing exponentially. This surge in production translates to a corresponding increase in the demand for packaging materials to ensure the safe and efficient delivery of medications to consumers.

However, with growing concerns over environmental sustainability and plastic pollution, there is a growing preference for sustainable packaging options among consumers, regulatory agencies, and pharmaceutical companies alike. Sustainable pharmaceutical packaging, which encompasses biodegradable, recyclable, and environmentally friendly materials, is becoming increasingly sought after as a means to reduce the environmental impact of pharmaceutical products throughout their lifecycle. As a result, the expansion of pharmaceutical markets is fueling a growing demand for sustainable packaging solutions globally, driving innovation and investment in eco-friendly packaging materials and technologies across the pharmaceutical industry.

Segmental Insights

Material Insights

Based on the Material, within the Global Sustainable Pharmaceutical Packaging Market, it is commonly observed that plastic, due to its versatility and cost-effectiveness, has a substantial share. However, there is an increasing push toward glass and metal packaging solutions owing to their recyclability and reduced environmental footprint. Glass, in particular, is gaining favor for its inert nature, which is crucial for preserving the integrity of sensitive pharmaceutical formulations. Its ability to maintain the quality

and stability of medications over extended periods is highly valued in the industry. Metal packaging options are also gaining traction due to their durability and ability to provide enhanced protection against external factors. Despite the growing popularity of glass and metal, plastic remains a dominant player due to ongoing innovations in biodegradable and recyclable polymers. These advancements contribute to the sustainability efforts of the pharmaceutical industry by reducing the environmental impact of plastic packaging. As the industry continues to evolve, a balance between the use of different materials will be crucial in ensuring the sustainability and effectiveness of pharmaceutical packaging solutions.

Process Insights

Based on the Process segment, among various eco-friendly packaging solutions, biodegradable packaging is currently witnessing significant growth within the Global Sustainable Pharmaceutical Packaging Market. This surge is driven by a heightened awareness of environmental issues and the implementation of stringent regulations aimed at reducing packaging waste. Biodegradable materials, which are specifically designed to decompose naturally, offer a sustainable solution with minimal environmental impact. This makes them an increasingly popular choice for companies seeking to enhance their sustainability credentials and reduce their carbon footprint. As ongoing research and development efforts continue to improve the durability and protective qualities of biodegradable packaging, its prominence in the pharmaceutical industry is expected to grow even further, leading to a more sustainable and environmentally conscious future for the sector.

Regional Insights

Europe is widely recognized as a frontrunner in the Global Sustainable Pharmaceutical Packaging Market. This position is largely attributed to the region's implementation of stringent regulations focused on reducing packaging waste and its strong cultural emphasis on sustainability. The commitment to environmental protection in Europe is further bolstered by the active participation of numerous leading pharmaceutical companies that are dedicated to adopting sustainable practices. As a result, Europe has emerged as a dominant player in this sector, driving innovation and setting new standards for sustainable pharmaceutical packaging worldwide. The European Union, in particular, has been at the forefront of promoting sustainable packaging solutions in the pharmaceutical industry. Through its comprehensive regulatory framework, which includes directives on waste management, recycling, and eco-design, the EU has created a conducive environment for the development and adoption of sustainable

packaging practices. This approach not only ensures the reduction of packaging waste but also promotes the use of eco-friendly materials and designs that minimize the environmental impact.

Europe's strong cultural emphasis on sustainability plays a significant role in driving the demand for sustainable pharmaceutical packaging. Consumers in the region are increasingly conscious of the environmental impact of their choices and are actively seeking out products that align with their values. This shift in consumer preferences has compelled pharmaceutical companies to prioritize sustainability in their packaging strategies, leading to the adoption of innovative and eco-friendly solutions.

The active participation of leading pharmaceutical companies in Europe further contributes to the region's dominance in the sustainable pharmaceutical packaging market. These companies, recognizing the importance of environmental stewardship, have made significant investments in research and development to develop packaging solutions that are both sustainable and effective. By embracing sustainable practices throughout their supply chains, these companies not only meet regulatory requirements but also gain a competitive advantage in the market. With its stringent regulations, cultural emphasis on sustainability, and active participation of leading pharmaceutical companies, Europe has established itself as a global leader in the field of sustainable pharmaceutical packaging. The region's commitment to environmental protection, coupled with its innovative approaches, continues to drive the industry forward, setting new standards and inspiring sustainable practices worldwide.

Key Market Players

Amcor plc

WestRock Company

Schott AG

Sonoco Products Company

Berry Global Group, Inc.

Mondi plc

Smurfit Kappa Group plc

Sealed Air Corporation

DS Smith Plc

K?rber AG

Report Scope:

In this report, the Global Sustainable Pharmaceutical Packaging Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Sustainable Pharmaceutical Packaging Market, By Material:

Paper

Glass

Metal

Plastic

Sustainable Pharmaceutical Packaging Market, By Process:

Reusable Packaging

Biodegradable Packaging

Recycled Packaging

Sustainable Pharmaceutical Packaging Market, By Product Type:

Bottles

Caps & Closures

Pouches & Sachets

Others

Sustainable Pharmaceutical Packaging Market, By End User:

Pharma Manufacturing

Contract Packaging

Retail Pharmacy

Others

Sustainable Pharmaceutical Packaging Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Sustainable Pharmaceutical Packaging Market.

Available Customizations:

Global Sustainable Pharmaceutical Packaging market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up

t%li%five).

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